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ABSTRACT

A two-year effort was conducted to develop a curriculum for minorities in small business ownership and management on the post-secondary level. Curriculum modules, instructor guides, student information sheets, and materials were developed and designed to enable and promote the successful participation of minorities and females in the entrepreneurial field. Individual needs of the students enrolled were assessed by the instructors, and training modules were presented in an attempt to satisfy personal needs while at the same time address global needs of present and future class enrollees. Two courses were offered and both received favorable student response. The conclusions drawn were (1) there is a great demand by ethnic minorities, females, and non-minorities for instruction in this subject area; (2) the curriculum is adaptable, usable, and effective in multicultural urban and rural settings; (3) the demand is greater by persons who want the specific instruction offered rather than by persons seeking a degree; (4) the course of instruction is of proven value in the minority community in which it was tested and should be replicated on a national level; and (5) instruction of the curriculum is more effectively performed by minority persons currently active in and familiar with small business operations than by credentialled faculty persons limited to an academic orientation. (Two related documents are available and include the curriculum products, CE 017 086, and a report on the bases for curriculum decisions with an annotated bibliography, CE 017 074.) (BM)

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THE DEVELOPMENT OF CURRICULUM FOR MINORITIES IN SMALL BUSINESS OWNERSHIP AND MANAGEMENT, POST-SECONDARY LEVEL

FINAL REPORT

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SECTION I

INTRODUCTION

This final report represents the culmination of a two (2) year effort in the "Development of Curriculum for Minorities In Small Business Ownership and Management, Post-Secondary Level."

Curriculum modules, instructor guides, student information sheets and materials have been developed and designed to enable and promote the successful participation of minorities and females in the entrepreneurial field.

The primary focus of this contractual effort was to involve, as a specifically targeted group, ethnic minorities who have been classified as "socially and economically disadvantaged," in education and training at the post secondary level in small business ownership and management.

The curriculum designed by this project was not duplicative of general course offerings in business administration, as such. Instead, individual needs of the students enrolled were assessed by the instructors and training modules were presented in an attempt to satisfy personal needs while at the same time addressing global needs of present class enrollees and anticipating needs of future enrollees.

Both of the courses offered received excellent student response. Coure I, An Introduction to Small Business Ownership and Management for Minorities, was successfully tested only at San Francisco City College (SFCC). Course II, Small Business Ownership and Management for Minorities, was tested successfully at both SFCC and San Francisco Community College Skills Center.

Conclusions drawn by the institutions, the Curriculum Team, and Del Green Associates (DGA) after testing are as follows:

1. There is a great demand by ethnic minorities and females for instruction in this subject area, as well as by non-minorities.

2. The developed and tested curriculum is adaptable, usable and effective in multi-cultural urban and rural settings.

3. The demand is greater by persons who want the specific instruction offered rather than by persons seeking a degree.

4. The course of instruction is of proven value in the minority community in which it was tested and should be replicated on a national level.

5. Instruction of the curriculum is more effectively performed by minority persons currently active in and familiar with small business operations than by credentialled faculty persons limited to an academic orientation.

We wish to acknowledge the invaluable contributions made by the members of the Curriculum Team in conceptualizing, developing, pilot-testing, and refining the two (2) course post-secondary curriculum and the

cooperation of San Francisco City College and the San Francisco Community College Skills Center in making available their facilities and faculty in the testing of the developed two (2) course instructional modules. While it is not possible to quantify the total in-kind contributions of these institutions, it is known that the total contribution amount is substantial.

SECTION II

BACKGROUND

The curriculum development effort described in this report came into being as part of a national focus of attention on the disproportionate participation, by various ethnic minority groups, in the national economic system. The need for such attention and the perceived urgency of the problem is well-capsulized in the following quote of Sidney P. Marland, past United States Commissioner of Education:

> "The opportunity for full participation in our free enterprise system by socially and economically disadvantaged persons is essential if we are to attain social and economic justice for such persons and improve the functioning of our national economy."

Our national economic system, whether it is described as "capitalist" or "free enterprise," is rooted in entrepreneurship. Business proprietorship and business management are, therefore, key positions in our business oriented society. According to Bureau of the Census statistics, however, 16.1% of the total non-minority workforce is represented in business ownership and management positions while only 6% of the total minority workforce is represented in such positions. The disparity is further exemplified by statistics obtained in the 1969 Census of

Minority Owned Business. The nation's ethnic minorities, consisting of Blacks, persons of Spanish-speaking ancestry, Asian Americans and Native Americans, constitute 17% of the population. Nationwide, however, representatives of these minority groups owned only 322,000 businesses, or 4.3% of the total number of business enterprises in the country. The picture is even bleaker in terms of gross receipts. While comprising 17% of the population but owning only 4.% of the total number of businesses, the minority business share of gross receipts, or total sales, of all United States businesses was only 0.7%. According to figures in 1972, issued by the Office of Minority Business Enterprise (OMBE), U.S. Department of Commerce, of all business assets in the United States in 1971, minority-owned businesses accounted for only 0.3% of the total.

The above percentage comparisons of number of businesses owned, gross receipts and business assets to total population, and between minority and non-minority populations, serves sufficiently well to describe the basic problem on which the national focus of attention was directed, in terms of minority participation in the nation's economic mainstream. An additional business problem exists which could not be excluded from the focus, and that is the alarming failure rate of small business. Dun & Bradstreet

reported that of the more than 10,000 businesses that failed in 1971, 54.2% had been in existence five years or less and 31.1% only three years or less. The cause analysis by Dun & Bradstreet of small business failures, generally, corresponded to assessment results of existing minority enterprise weaknesses, i.e., poor administrative and management skills. The problem, then, as defined, indicated that education and training should constitute a major approach in 1) increasing minority participation in business ownership/management, and 2) increasing the ownership/management skill levels of existing and potential entrepreneurs. In light of the indicated necessity for education and training to effect the desired changes, a Task Force on Education and Training for Minority Business Enterprise was established in 1972 to undertake a national study of the education and training needs of existing and future minority entrepreneurs.

The Task Force was created at the request of the Federal Interagency Council on Minority Business Enterprise, which had been formed to coordinate and focus government activities on meeting the needs of minority business development. Chaired by the Under Secretary of Commerce, the Council includes representatives from a number of federal government agencies. The Council, at that time

chaired by Under Secretary James T. Lynn, requested the U.S. Department of Health, Education and Welfare (HEW) to establish the Task Force and perform a leadership role in its activities. It was thus established and the then Associate Commissioner of Adult, Vocational and Technical Education, Dr. Robert M. Worthington, was appointed as Chairman.

The Task Force, which consisted of more than 70 members, embarked upon an 18-month study, including public hearings, which provided a thorough examination of education and training relative to minority business ownership and management. All Task Force activities were oriented toward the ultimate objective of providing specific recommendations for minority enterprise education and training. This ultimate objective was defined in terms of a twofold purpose of the Task Force:

> "1) to chart a practical course for implementing programs which would respond to the needs of existing, potential, and future minority entrepreneurs.
>
> 2) to mobilize the resources and the interest necessary for a comprehensive education and training program at the national, state and local levels." [1]

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1. Report of the Task Force on Education and Training for Minority Business Enterprise (Washington: U.S. Department of Commerce, Office of Minority Business Enterprise, 1974), p.xv

In January of 1974 the Task Force submitted to the Secretary of Health, Education, and Welfare and the Secretary of Commerce its Report which contained a complete presentation of the Task Force's findings, conclusions and recommendations.

Task Force Report discussions which pertain to post secondary business education and training are briefly reviewed here, as they relate directly to our curriculum development for small business ownership and management for minorities.

The line with its charge to develop recommendations which would respond to the needs of existing, potential and future entrepreneurs, the Task Force used the following working definitions for the three target groups:

> "Existing Entrepreneur. One who is currently an owner or part-owner of a business.
>
> Potential Entrepreneur. One who is on the threshold of becoming an owner or part-owner of a business.
>
> Future Entrepreneur. A minority youth at the elementary, secondary, or postsecondary educational level, or one outside the educational system, who will have the opportunity to recognize business ownership as a possible career choice." [2]

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2. Ibid., p. xviii

Reviewing these definitions, one can see post secondary educational institutions serving as vehicles for reaching all three target groups. The Task Force was explicit in pointing out the role of these institutions, particularly in meeting the education and training needs of the existing and the future entrepreneur - the former in terms of receiving management assistance from post secondary institutions and the latter in terms of minority student recruitment efforts and solicitation of fellowship and scholarship funds for minorities by these institutions, for study at both the graduate and the undergraduate levels. [3]

Having identified a role for post secondary educational institutions in nationally addressing the need for business ownership and management education and training for minorities, development of curriculum for use in that setting was expectedly recognized as a further need. This need is either implied or stated throughout the Task Force Report.

The U.S. Office of Education, HEW, is playing an active role in supporting needed programs in minority business education and training. Accordingly, their funding of this project was, in essence, an expansion of already existing activities in promoting minority enterprise education and training.

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3. Ibid., p. 94

SECTION III

THE PROJECT

A. GENERAL

Within the context of official national recognition of the need for increased attention to education and training for minority business enterprise, the Office of Education, U.S. Department of Health, Education and Welfare, contracted with DGA, a Small Business Administration 8(a) contractor, to conduct the subject two-year project. The contract became effective July 1, 1974.

The first year of the project was devoted to the design and development of curriculum modules, instructor guides and student information sheets. The second year of the project was concentrated on the testing, revision and refinement of those products.

B. GEAR-UP

Immediate activities undertaken after contract award were the employment of staff, selection of curriculum team members, and preliminary efforts.

1. Project Staff

Del Green, the President of Del Green Associates (DGA), served as the Project Director for the first year of the contract. Mr. Green was ideally suited

to direct a project of this nature, having extensive background in the education and business professions. In the educational field, Mr. Green has a Master of Science Education degree plus years of classroom teaching experience that included teaching and designing curriculum for disadvantaged students. His business experience prior to founding, owning and managing DGA included administrative and executive level management positions in several firms and organizations.

Dave Harriman began work on the project as the Project Researcher and Coordinator and eventually succeeded Mr. Green as Project Director. Mr. Harriman has a Master of Administration degree and brought to the project a background in planning, coordinating and evaluating education and training programs, having had experience as a manpower planner for a Manpower Area Planning Council and having served as a senior field assessor under a Regional Department of Labor-funded project.

2. Selection of Curriculum Team Members

An exhaustive effort was made by DGA to identify prospective curriculum team members in the San Francisco Bay Area Counties who would avail themselves

to work on the project. We specifically searched for professional educators and business persons who would be compatible to the project and the ethnic composition of the target student population. We interviewed several persons and finally selected twelve (12) to serve on the Curriculum Team. The persons selected to constitute the team were chosen with the idea of developing a multi-ethnic, multi-disciplinary working unit that would serve as a vital resource throughout the conceptualization and curriculum development processes. The selected members of the curriculum team were as follows:

Louis Barnett - businessperson; Executive Director, PACT - a San Francisco-based Business Development Organization (BDO)

John Bee - businessperson; Urban Affairs, Kaiser Industries

Louis Carter - businessperson; Executive Director, California Job Creation Program

Estella Dooley - attorney at law

Jacquelyn Green - educator; Chairman, Foreign Language Dept., City College of San Francisco

Josephine Jimenez - businessperson; community worker; Vice President, City Center Federal Savings & Loan Association

Ray Johnson - businessperson; Employee Relations Manager, Philco Ford Corporation

Dr. Tomas Martinez - educator; writer, sociologist

Dr. Ennis McDaniel - educator; Professor, Counseling, Psychology, California State University, Sacramento

Dr. David C. Wigglesworth - education consultant; President, Technical Research Associates, Inc.

Dr. Jack Yuen - educator; Professor, School of Business, California State University, San Francisco

3. Preliminary Research

After contract award and prior to convening staff and the curriculum team for the initial orientation, early research activities were conducted to more accurately determine the "what is" in terms of existing small business management curriculum and also to determine current developmental efforts. This research was conducted primarily through written communication with colleges and universities, throughout the United States. Curriculum information was requested for both general small business instruction and such instruction geared for minorities. The feedback from this communication was primarily in the nature of, "We are interested in your project but we have nothing of that nature at the current time." Other research activities included visits to Bay Area organizations affiliated with the Office of Minority Business Enterprise (OMBE) and the Small Business

Administration (SBA), to review and/or obtain available project-relevant data and materials.

C. ORIENTATION AND TRAINING OF CURRICULUM TEAM MEMBERS

DGA project staff conducted a two (2) day orientation and training session for Curriculum Team members on August 23 and 24, 1974 to familiarize them with the scope, magnitude and intent of the contract.

Agenda items included a project overview, DGA administrative procedures related to Curriculum Team participation in the project, a detailed review of the contract statement of work and open discussion. In addition to project particulars, the overview included discussion of the conclusions and recommendations of the Task Force on Education and Training for Minority Business Enterprise and a brief description of the national context under which the project came into being. Mr. Louis Carter of the California Job Creation Program Board (CAL JOBS), State of California, shared with the total group the current activities and functions of CAL JOBS in the area of minority small business assistance throughout California. The open discussion included questions

and answers, general discussion, and idea exchange. What developed was a brainstorm session which marked the beginning of the joint staff - curriculum team conceptualization processes.

Among the ideas that were initially generated during this open discussion were:

-- education and training devised for small business ownership/management (especially minority small business ownership/management) should emphasize a "nuts and bolts" approach, eschewing a theoretical, textbook approach, and would therefore, include such items as identification of, and means of entree to, local money sources.
-- the eventual curriculum should be such that it could accommodate the needs of all students, representing diverse background perspectives and, therefore, a variety of motivations leading to interest in small business ownership and management.

One of the concerns expressed during the open discussion was in regard to on-site testing of the curriculum. The concern was stated in the context

of the capability to generate valid evaluation data at only one site, given the subject matter involved and the diversity among education and training needs of the target student population. It was stated that efforts should be made to generate additional funds from a number of other sources to try to effect multi-site testing.

All in all, it was an enthusiastic and productive orientation session. It was concluded with the understanding that additional meetings and/or workshops would be scheduled with curriculum team members in the near future, in preparation for the first major contract deliverable, the "Bases for Curriculum Decisions."

D. CURRICULUM TEAM WORKSHOPS

Two workshops were conducted for Curriculum Team members for the purpose of deciding curriculum content and establishing bases for curriculum decisions.

A one-day workshop was held in September, 1974 and was attended by the business persons on the Curriculum Team. The purpose of this workshop was to develop more definitive curriculum content criteria based on research and conceptualization that had ensued following the orientation session in August, 1974. It was a productive session and was aided greatly by the

participation of Mr. Jim Wykle of the U.S. Office of Education and Ms. Betty Cox from the National Business Education Association. The outcome of the session was a list of curriculum subject areas divided into major topics and sub-topics for discussion and review at the October meeting.

The October, 1974 workshop, attended by the entire Curriculum Team, began with a complete review and discussion of all project activities that had been conducted up to that time. The major part of the session was spent in reviewing and conceptualizing the topics developed at the previous meeting. The entire staff - curriculum team group was divided into small groups to brainstorm the developed subject areas. The main focus of small-group discussion and deliberation was on identifying and justifying priorities among and within the major subject areas (curriculum content areas), based on criteria representing both cultural/ethnic considerations and business ownership/management considerations. In the seminar-type total group discussion that followed, all the various issues which had been raised in the small groups were shared, discussed, and in varying measures, resolved.

The following typify the nature of what was produced in terms of a foundation for later specific curriculum decisions:

Content decisions - overall

... These decisions and their bases must 1) relate to survival techniques in the business community, generally, and the small business arena, specifically, and 2) recognize the diverse past and present cultural, social, and economic environments of participants in classes using the curriculum, and the diverse perceptions of the future (expectations) among these participants.

... as an extension of the above, decisions must be established which relate necessary traditional business practices and procedures to minority students' needs and aspirations.

Content decisions - relative to particular subject areas

... Marketing content should relate to a common minority need-to have, and to convey, a positive self-image.

... Finance content should be comprehensive to cover potential education and training needs of future minority entrepreneurs, given a probable lack of readily available financial resources; incomplete knowledge of outside sources; little or no experience in financial planning or management, in a business sense; lack of familiarity with financial forms and reports; etc.

In addition to marketing and finance, other areas identified and discussed in the context of relating small business ownership and management procedures to ethnic/

cultural backgrounds and needs included management, communication, law, insurance, personnel, record-keeping, community relations, government relations, professional business relations, inventory control, quality control, crime and business terminations. "Management" and "Communication" were readily identified as pervasive of all areas, but were deemed of such obvious importance as to be dealt with individually in the discussion.

In addition to coverage of content areas, certain other matters received attention as well. Key among these other matters was the issue of how to include all necessary subject matter into a course of instruction. It was during this discussion that our decision was reached to employ a two-course format, the first course to be introductory in nature and oriented toward the "what is" and the second course to be developed as a follow-up to the introductory course and oriented toward the "how to."

There was also discussion of the need to use minority business persons to provide classroom instruction and, in this regard, support was generated for using both businesspersons and educators from the curriculum team as instructors. Speculative discussion took place in reference to such things as expected and

appropriate class size, recruitment processes, and expected ethnic mix among students. In total, the session was very effective and fruitful, producing the basic framework for the entire range of decisions as eventually outlined and discussed in the "Bases for Curriculum Decisions."

E. STAFF RESEARCH ACTIVITIES

The project staff participated in a variety of research activities during the period between Curriculum Team orientation and submission of the "Bases for Curriculum Decisions."

In addition to library searches being conducted, bibliographies were reviewed and books and other publications were ordered and reviewed to determine their applicability as reference sources, to determine their classroom usability, and to glean as much information as possible about the history and the current status of minority participation in the business world. In addition to reviewing existing bibliographies for these purposes, contact was made with publishers, lists of available publications were obtained and selected publications were ordered.

Additionally, a Bay Area research effort was conducted which consisted of selecting, visiting, and preparing profiles of representative small minority

businesses. (Incidentally, this locally-conducted effort produced results in line with national statistics indicating that the preponderance of minority ownership/management activity is in the small retail trade business.)

In addition to these activities, catalogues were obtained from two-year and four-year institutions of higher education to determine the nature and extent of available course offerings in small business ownership/management. It was found that such curriculum generally consists of one or two courses (elective), and serves basically an "awareness" function. The full impact and significance of this finding was not to be realized until later. At the time of the finding, it was regarded merely as additional information, or perhaps more accurately, as an unsuccessful attempt to find a base from which to develop an effective, minority-oriented curriculum. The importance and significance of the finding will be explored and discussed in more detail later in this report. Let it suffice, presently, to state that the nature of existing course offerings in small business is one indication of the dichotomy that exists between the corporate business world and the

world of small business, particularly in terms of the different management perspectives (from an employment point of view) and the resultant difference in assumed academic preparation required for entry employment.

F. BASES FOR CURRICULUM DECISIONS

It was recognized by the DGA staff and Curriculum Team members during the orientation sessions that establishing bases for curriculum decisions was the most important task of the contract.

We deliberately set about to first of all establish task parameters. These parameters established criteria for course content based upon perceived needs of minority business persons and the justification for curriculum development in the subject areas. Open discussion among DGA staff and Curriculum Team members produced subject areas for each course with the justification for inclusion in the curriculum. The ethnic mix of Curriculum Team allowed us to proceed, incorporating concerns regarding cultural backgrounds as well as anticipated student reaction into the "Bases." The Curriculum Team members thought through very carefully each subject area, taking into full consideration student needs based upon ethnicity

and the consequent desired outcomes from instruction. All of this is implicitly reflected in the "Bases for Curriculum Decisions." The actual development of the document was a DGA staff - Curriculum Team effort and was not finalized and submitted until reviewed and refined by the entire group.

The "Bases for Curriculum Decisions," which was submitted to the U.S. Office of Education in late December, 1974, and subsequently approved in January, 1975, represented the results of the conceptualization process and the extensive degree of research which had been performed since the inception of the project. A copy of the "Bases," as submitted and approved, is included in this report as Appendix "A".

G. PROJECT RELATED ACTIVITIES/EVENTS, THUS FAR

Throughout the period between contract award and receipt of approval of the "Bases for Curriculum Decisions" other activities and events occurred which, although not directly involved in the curriculum development process, were significant, nonetheless.

1. Association with Part I Contractors

a. Initial Meeting

During the first month of the contract, the Project Director attended a Washington, D.C. meeting which afforded the first opportunity to meet with the other three USOE contractors who were conducting small business ownership curriculum projects funded under Part I of the Vocational Education Amendments of 1968. Each of the four projects was contracted to develop curriculum for a separate educational level:

Contractor: National Business Education Association (NBEA), Washington, D.C.

Project: (Title of Proposal) "Business Ownership Curriculum Project for the Prevocational and Exploratory Level (Grades 7-9)"

Contractor: Athena Corporation, Bethesda, Maryland

Project: (Title of Proposal) "Proposal to Develop Curriculum and Curriculum Materials Relative to Small Business Ownership and Management Training for Grades 10-12"

Contractor: Del Green Associates (DGA), Foster City, California

Project: (Title of Proposal) "A Proposal for the Development of Curriculum for Minorities in Small Business Ownership and Management, Post-Secondary Level"

Contractor: University of Minnesota, St. Paul, Minnesota

Project: (Title of Proposal) "Development, Demonstration and Evaluation of Management Education Programs for Small Business Entrepreneurs, Including Minorities (in-service Adult Education)"

The initial meeting was arranged for the purpose of setting a basis for future communication and coordination among the Part I projects in order to enhance the prospects of ultimately developing a sequentially coherent small business ownership instructional system (grades 7-14, and adults).

The technical proposals submitted by the four (4) contracts represent a progression and continuity of small business ownership education and training from the junior high school level through the adult level. Among the four proposals, however, there are varying degrees of proposed efforts to address minority needs. Our post secondary project is the only one of the four which is directed specifically at a minority student population.

b. Meeting at University of Minnesota

In January, 1975, Mr. Green and Mr. Harriman attended a meeting on the St. Paul campus of the University of Minnesota, hosted by Dr. Edgar Persons, Director of the University of Minnesota Project. The purpose of the meeting was to foster greater coordination among the three still active Part I projects - University of Minnesota, Athena Corporation, and DGA. In addition to Dr. Persons and the DGA representatives, Judith Springer of the Athena Corporation, Jim Wykle of USOE and Dr. Persons' project staff all participated in the meeting.

The discussion consisted of a total review of the status of each project, materials developed to date, similarities and differences among goals and objectives of the respective projects, and the commonality of problems encountered in project operations. Groundwork was laid for increased coordinative activities among the projects, which it was felt could enhance the prospects of eventually developing a sequential small business management curriculum package. DGA expressed serious concern, however, that curriculum

development at the junior high, high school and adult levels, while addressing global curriculum needs, failed to attach any strong significance to the needs of participating minority students. DGA recommended, therefore, that the curriculum materials for the post-secondary level be reviewed to determine what could be incorporated into the other projects to fill the void which we perceived.

Coordination among the projects was also discussed in the context of facilitating the organization and development of an advocacy role to be performed by Part I projects which would be more effectively performed as a joint effort than as three separate efforts. We felt this meeting was productive and informative and it was agreed that follow-up meetings should take place, and communication among the projects should be maintained.

2. San Francisco City College Meeting

On October 9, 1974, Mr. Green and Mr. Harriman visited the San Francisco City College campus to personally meet with the Dean of Instruction, Dr. Jack Aldridge; the Chairman of the Business Department,

Mr. Keith Kerr; and several faculty representatives of the Business Department. The nature, scope and objectives of our project were explained to them and they, in turn, expressed their willingness to at least provide the facilities necessary for testing the curriculum but apprising us of their budgeting constraints. The meeting resulted in the granting of tentative approval to use SFCC as the curriculum test site.

3. Participation in National Conference of the National Business League

In October, 1974, Mr. Green participated in a national conference of the National Business League. Fellow participants at the conference indicated a high degree of interest in the subject project and its potential, and there was some discussion of possibly being able to effect the previously mentioned objective(s) of generating additional funds and/or arranging additional test sites. Follow-up contacts were made with representatives of both the Small Business Administration and with the Office of Minority Business Enterprise, U.S. Department of Commerce, in attempts to further pursue the matter. While the follow-up contacts did not produce the

desired results (additional funding and test sites) it was felt that the effort was worthwile in setting the stage for further communication and in increasing federal level awareness of the project.

4. Minority Business Summit Conference

In early January, 1975, Mr. Green participated in SBA's Minority Business Summit Conference, co-sponsored by the National Business League and the National Economic Development Association (NEDA). The participation was important in that it afforded an opportunity to personally meet with executive level representatives of SBA and to discover the lack of awareness, at that level of SBA, of USOE-funded curriculum development efforts in the small business field. DGA considered it of vital importance not only that a mutual awareness exist among federal level agenices as to similar activities being undertaken, but that development of linkages be actively pursued for the purpose of federal-level interagency discussion of common objectives and coordination of like-purpose activities, in respect to minority business management education activities. DGA has, since that time tried to play some role in engendering such federal level coordination.

H. DEVELOPMENT OF TRAINING MODULES AND INSTRUCTOR GUIDES

After the "Bases for Curriculum Decisions" the next major product to be developed was the actual curriculum modules and instructor guides. Much research, thought, and consideration went into this effort to shape and form the approved curriculum decisions into an appropriate, effective and usable curriculum format and methodology. The task included, in addition to selection or development of curriculum format and design: subject matter sequencing, formulation of objectives, development of teaching - learning strategies, and acquisition and development of instructional materials.

1. Procedures

Our planned approach to developing the curriculum modules consisted of:

- -- preliminary research to find sample curriculum models which might be used or adapted for effective incorporation of our curriculum content decisions.
- -- convening of a workshop session with curriculum team members for the purpose of reviewing and discussing the sample curriculum modules obtained in the preliminary research; arranging subject matter in an appropriate and effective sequence; beginning the formulation of specific objectives;

conceptualizing appropriate teaching-learning strategies and discussing instructional materials needs.

-- staff and curriculum team activities, as needed, for final formulation of actual training modules and instructor guides.

a. Preliminary Research

Preparatory to the workshop session with curriculum team member, the project staff obtained, examined and compared sample modular instruction formats which represented various educational levels and a wide range of education or training subject areas. A wide variety of samples was obtained in order to thoroughly examine and compare a diversity of curriculum approaches in terms of 1) allowing a flexible approach by the user (teacher, instructor, trainer) and 2) facilitating the conveyance of pragmatic instruction.

In addition, the staff collected and reviewed materials on preparing instructional objectives, for use in the workshop.

b. February 6, 1975 Workshop With Curriculum Team Members

The session began with a discussion of the sample modular instruction formats, with staff members sharing the opinions as to strengths and weaknesses of the various formats and designs that they had developed in earlier review. The discussion was directed at an

assessment of the applicability of each sample "as is" and as adaptable to meet our needs. It was recognized that the differences in overall purpose and objective of the two courses would have to be reflected in the objectives, the activities and the strategies which would be eventually incorporated in the training modules. In other words, the introductory course, directed at "what is" in minority small business ownership/ management would have a different approach and orientation than the follow-up course directed at the "how to" of owning or operating a minority small business. Upon completion of group assessment of the sample formats, the consensus was 1) that additional efforts would be required to achieve the specific module format and design, and 2) that stated instructional objectives should serve as the nucleus of each module, around which the module format and design could be developed. The remainder of the workshop resulted in the sequential arrangement of subject matter; specification of items within the subject categories that should be written into statements of objectives; beginning formulation of statements

of behavioral objectives, using staff-obtained materials on preparing instructional objectives; and identification of teaching strategies and instructional materials that should be included in the ultimate modules and/or instructor guides.

This workshop session marked the beginning of participation in the project by a new Curriculum Team member, Jose Maestre. Mr. Maestre was placed on the team as a business representative, being a self-employed business person with special expertise in the areas of marketing and market research.

c. Finalizing the Product for Submission to USOE/DHEW

Initial activities of the project staff and curriculum team members, following the February 6, 1975 workshop session, were concentrated on preparing curriculum module unit objectives and outlining activities that would correspond to the objectives. We began this effort by basing our development of objectives within a conceptual context for the introductory course and a behavioral context for the follow-up course, and attempting to develop strategic teaching - learning activities -

lab and lecture - that would effectively accomplish the objectives. This effort progressed well, and succeeded in producing a draft of sequential sets of corresponding objectives and activities.

At this point, however, we experienced some difficulty in proceeding into the finalization of the modules and instructor guides. Although we were satisfied with the sequencing and presentation of subject matter, in the objectives and activities that had been produced, we were now faced with the problem of designing a model which could effectively set forth an instructional process that would 1) ensure a flexible teaching-learning proceudre, 2) allow a sufficient degree of individualized instruction, and 3) facilitate the desired pragmatic orientation.

The ultimate resolution of the problem came from Dr. McDaniel of the Curriculum Team, who because of his geographic location outside the immediate San Francisco Bay Area had not been closely involved with the project since the two-day curriculum team workshops in October, 1974. Upon being apprised of the progress and problems, to date, in development of the training modules,

and reviewing the instructional objectives and corresponding activities that had been produced, Dr. McDaniel suggested the use of a competency-based model. Dr. McDaniel, who had had considerable experience in competency-based teacher education (CBTE) through involvement in a Teacher Corps project, was asked, and subsequently agreed, to take the introductory course materials and attempt to put them into a competency-based module format, based on the CBTE model. At the culmination of his effort, the curriculum team decided adopt the competency-based model for our project curriculum.

2. The Competency-Based Model

Among the inherent qualities of the competency-based model which make it particularly suitable for our purposes are the performance objectives, designed to serve as the focal point of each module. This provides for outcome-oriented instruction and learning, aimed at the achievement of performance objectives rather than at grade achievement. The desired degree of flexibility is also enabled by this model as the instructor and students choose those activities most suitable to them to achieve the specified expected behavior as defined in the performance objectives. Given the multi-racial,

multi-ethnic nature of the target student population, this flexibility among activities and approaches serves much more effectively than rigidly prescribed learning activities which cannot fully take into consideration the diversities among the students in terms of cultural ethnic backgrounds and, very importantly, in terms of academic background. Recognition of differences in academic orientation and background is crucial in post secondary education and training in small business ownership and management for minorities.

In consideration of the wide differences among prospective owner/managers, and in consideration of the cross-cultural approach required for this project, the competency-based approach and format seemed ideally suited for our purposes.

3. Submission of Training Modules and Instructor Guides to USOE

The introductory course modules which were ultimately submitted to USOE were essentially the same product that Dr. McDaniel prepared in demonstrating the applicability of the competency-based model and format.

The introductory course and follow-up course training modules, which contained the basic subject areas as had been outlined earlier in the "Bases for

Curriculum Decisions," and which had been arranged and formulated using a competency-based model and format, were submitted along with the respective instructor guides to USOE in June, 1975, for approval.

I. PROJECT-RELATED ACTIVITIES/EVENTS, CONTINUED

The following activities and events were participated in, or conducted by, project staff persons during the contract period after USOE approval of the "Bases for Curriculum Decisions" and prior to submission of the training modules and instructor guides to USOE for approval.

a. "Conference on Education and Training for Minority Business Enterprise"

In February, 1975 Mr. Green participated as an "invited expert" in a Washington, D.C. "Conference on Education and Training for Minority Enterprise" sponsored by the Implementation Task Force on Education and Training for Minority Business Enterprise. The opportunity to participate in such a session was considered mutually beneficial as it enabled input into national program objectives from the perspective of our particular project and enabled for us a first-hand look at the focus of continuing national efforts in minority business education.

b. Bay Area Seminar "How to Start and Finance Your Own Business"

Ideas for improving some aspects of subject area coverage in our curriculum were obtained through participation by Mr. Harriman and Mr. Watson of DGA in a Bay Area seminar held in February, 1975, entitled "How to Start and Finance Your Own Business." Our participation was brought about by our on-going association with Lou Carter, Executive Director of the California Job Creation Program Board (CAL JOBS), a co-sponsor of the seminar. Among the principal participants in the seminar were nationally known figures such as John Komives of the Center for Venture Management and Donald Dible, author of Up Your Own Organization. The most important idea gained from the seminar presentations was that any pragmatically oriented course of instruction in small business ownership and management would not be complete without practical instruction in the preparation of a Business Plan.

c. IMBE Training Conference

During the week of March 17, Mr. Harriman participated in a managerial and organizational development training program, conducted by the Institute for

Minority Business Education (IMBE) of Howard University. The 3½ day training conference provided, in addition to the benefit of the training itself, an opportunity to meet and associate with executives and administrators of local Business Development Organizations (LBDO's) and similar organizations, and obtain a better understanding of the purpose, functions and procedures of these organizations in terms of providing assistance to small minority businesses.

d. Metropolitan Adult Education Program

Also through association with Lou Carter and CAL JOBS, Mr. Harriman arranged a meeting in April with Dr. Bruce Moritz of the Metropolitan Adult Education PRogram (MAEP) in San Jose, California. Within that setting, Dr. Moritz has developed curriculum for, and instructed, small business management courses. A fruitful exchange of ideas took place and a basis for futher communication was established. Dr. Moritz co-authored a book entitled Your Own Business - The American Dream, a copy of which he provided to our project. Because of its pragmatic orientation to the various elements of small business ownership and management, the book was extremely helpful to us throughout the project.

e. "Workshop on Pilot and Field-Testing of Curriculum Materials"

Mr. Green and Mr. Harriman participated in the April 28-30 "Workshop on Pilot and Field-Testing of Curriculum Materials" in Washington, D.C., conducted by Contract Research Corporation. In addition to its value in providing exposure to and faimiliarity with standard curriculum testing procedures and techniques, the workshop also afforded an opportunity to meet with other curriculum developers to exchange ideas and discuss similarities and differences among the respective curriculum development projects, in terms of curriculum goals and objectives, curriculum content and approach, test site setting, etc.

f. Post "Workshop" Meeting at USOE

Immediately following the "Pilot and Field-Testing" workshop, Mr. Green and Mr. Harriman convened at USOE with the Director and staff persons from the University of Minnesota and the Athena Corp. projects, along with both Jim Wykle and Ed Nelson of USOE. The meeting was brief but served to bring everyone up-to-date on the status of the respective projects. This was the final meeting held among Part I contractors.

g. USOE Approval of DGA Requested Change in Project Directorship

Mr. Green's written request that he be replaced by Mr. Harriman as Project Director was approved by USOE, effective June 16, 1975.

J. THE TESTING PLAN

1. General Objectives

The three primary objectives to be accomplished in the curriculum testing process were defined as determination of:

--- curriculum effectiveness
--- usability of curriculum
--- relevancy of curriculum

Evaluation in this context could be accomplished largely by mechanisms "built in" the modular design. For example, effectiveness is determinable on an on-going basis with the instructor(s) and students both assessing student competence in the achievement of specified performance objectives. The competency-based module was designed to make usability a high priority objective by utilizing performance objectives as the focal point of each module, thus allowing for flexibility in approach by both instructor and student to achieve the desired competency.

Although the assessment of curriculum relevancy is not accomplished by mechanisms built in the modular design, the relevancy of the subject matter to "real world" small business ownership/management operations is less an evaluation concern as the instructional input is provided by current actors in the field of small business.

2. The Plan

a. Basic Components

The ultimate testing plan consists of four basic components:

--- instructor feedback
--- student feedback
--- staff monitoring and observation
--- post course evaluation instrument for introductory course; and pre-post test and post course evaluation instrument for second course

b. Overall Plan

The overall testing plan was devised to provide evaluation information on an on-going basis throughout the instruction/testing period. The evaluation information would be primarily descriptive in nature and would be obtained through contractor staff monitoring and observation activities, instructor "debriefing"

and unstructured feedback from students. Evaluation instruments were developed mainly to provide information that would complement the evaluative information obtained otherwise. Necessary clearance (approval) for use of the instruments in the testing process was obtained by USOE/DHEW. Copies of the instruments are included in this report as Exhibits 3A thru 3C.

K. INSTRUCTOR SELECTION AND TRAINING

1. Selection

The instructors for Course I were selected from the Curriculum Team. When staff sent copies of the modules to team members for their review and comment, team members were requested to identify those modules which they felt qualified to instruct. Based largely on the feedback obtained, the following members of the team were selected to serve as instructors in the testing of Course I:

... Dr. Ennis McDaniel
... Jose Maestre
... Dr. Tomas Martinez
... Lou Barnett
... Dr. Jack Yuen

Mr. Green also served as a Course I instructor.

2. Training

The first of two instructor training sessions was conducted on August 23, 1975. Curriculum Team members who would be serving as instructors were in attendance as well as Mr. Green and Mr. Harriman of DGA. Mr. Louis Lindsey, who served as the SFCC Instructor of Record, was also in attendance. Dr. McDaniel conducted the initial training because of his past experience with the working knowledge of competency-based education. He began with an orientation of what it is and how it works, relating his own personal experiences with it, and giving a slide presentation. After the general orientation and follow-up question and answer session, each component of each module in Course I was reviewed and discussed, accompanied by an orientation in the use of the instructor guide. The meeting concluded with tentative scheduling of instructors.

The second instructor training session was conducted on the SFCC campus following the initial class session, and included the same participants as Session I.

This session enabled the group to share information on the first class, and assess and

evaluate plans and procedures for effectively conducting the Course I testing process.

Those participants who had observed the first class completely reviewed the proceedings for those who hadn't. Upon completion of the familiarization of all participants as to class size, make-up of student population, classroom setting, etc. the remainder of the training session was devoted to discussion of plans, strategies and procedures which would facilitate the testing process. Agreement was reached that project staff and instructors should convene as a group at least twice during the semester in order to ensure the necessary coordination among instructors and the desired continuity in the instruction.

L. TEST SITE ARRANGEMENTS

Mr. Harriman met, on separate occasions, with Mr. Bill Valiente, a Dean of the Evening Division, and Mr. Jack Aldridge, Dean of Instruction, SFCC, for the purpose of making the final arrangements for our curriculum to become officially entered into the Evening Division Bulletin of course offerings for School Year '75-'76. Also, recruitment strategies

were formulated to ensure the desired racial balance among the students participating in the courses. Copies of the modules were provided to each of the Deans and each indicated his high regard for the product.

Official numbering and titling of the courses, and arrangements for a SFCC faculty representative to serve as the Course I "Instructor of Record" were accomplished through a meeting with Dean Aldridge. The courses were officially titled and numbered under the category of "experimental courses" in order to avoid the general requirement that new courses go through an extensive process of review and approval by a curriculum committee before being officially authorized.

Course I was officially listed as Business 695 - Introduction to Small Business Ownership and Management; Course II was listed as Business 696 - Practical Experiences in Small Business Ownership and Management. Course title wording contains no reference to minorities because of a strictly adhered to policy at SFCC of designating neither race, creed, nor sex in any course offerings. It was recognized, however, that adequate minority participation in the course would have to be effected in the recruitment process anyway,

as pre-enrollment was not possible for "experimental" courses and, therefore, official titles and descriptions would have no bearing on minority or non-minority enrollment in the course.

Meetings with Dean Valiente, SFCC Evening Division, resulted in the finalization of recruitment plans, the assignment of a classroom, and a day and time for meeting. The recruitment plans called for DGA assuming the major responsibility for publicizing the course. This responsibility was fulfilled by the preparation and distribution of press releases and public service announcements to San Francisco Bay Area newspapers and multi-media outlets. (See Exhibits 2A through 2F)

M. COURSE I TESTING

1. Implementation

Course I was successfully implemented at San Francisco City College (SFCC) on Saturday, September 13, 1975. The course was listed in the college's course description catalogue as Business 695, "Introduction to Small Business Ownership and Management." Initial expectations were for a class size of approximately 30 students but due to SFCC's registration policies,which do not limit class size, the first day of enrollment numbered more than 90. Apprehensions concerning the class size were somewhat alleviated by Mr. Lindsey, SFCC, who indicated that generally speaking, from his experience and observations at SFCC, 50% of most students who attend the first class usually never return. This phenomenon is quite simple to explain since during the first week of the academic semester most students have a tendency to "shop around" for classes before selecting the courses they prefer. At the end of the first session the official initial enrollment in the course was 64 students (36 of them being minority group members). Of these 64 students, 41 completed the course and all but three (3) received credit. All minority students that began the class completed the class.

Dr. Ennis McDaniel, who served as the first day instructor and other training session instructors who had observed the first day proceedings, provided a full review and assessment of the initial class. This served as a preview for other instructors as to class size, ethnic mix, student interests, etc. and enabled them to more effectively develop their lesson plans to meet the global needs of the class.

Contingency instructional plans were established for dealing with unexpected situations. Back-up DGA instructors were assigned to each class session to give general assistance to the instructor and be on hand to moderate small group activities.

An integrated plan of action for maintaining on-going communication linkages among instructors, DGA project staff, and SFCC was implemented. The respective role of each was identified to provide feedback of testing information, after each class, on the selected report items.

2. Classroom Procedures

In view of the large class size and in order to put into action the most effective plans to assure organization and control of the testing process a set of formalized procedures was developed and

instituted. Operationally, this system of formalized procedures contained two basic elements. The first was the assignment of one person to serve as the primary coordinator between the instructors and project administration, and the second was to establish a coordination methodology. In the project utilization of the system, the "primary coordinator" served in the capacity of lead instructor.

a. Lead Instructor

Mr. Lindsey's participation in the total testing process was of minor involvement since it entailed carrying out simple classroom activities such as keeping classroom attendance. Mr. Lindsay who served in the capacity of the SFCC "Instructor of Record" was not in a position to serve as the in-between person to provide the needed coordination and control which would assure the effective testing of the curriculum. In the same fashion, neither could he in his limited capacity, ensure the desired continuity of instruction as the course developed. To fill this void in the testing process, the role of "Lead Instructor" was created. The Project Director, aware of the sensitivity of this particular position, asked Mr. Jose Maestre to fulfill this role because of his familiarity with total curriculum content and purpose.

Subsequently, Mr. Maestre agreed to accept the position of lead instructor, and performed in that capacity throughout the testing of Course I.

b. Coordination Methodology

The key elements used to implement the system of formalized classroom procedures were the development of three forms, or instruments, which were used to facilitate the necessary communication between the instructors and project staff. Copies of the forms are included in this report as Exhibits 3A, 3B, and 3C.

The Student Information Sheets were prepared for each class by the instructor and submitted to DGA at least 8 days prior to instruction of the assigned module. This procedure was followed so that the sheets could be finalized and disseminated to students a week in advance of instruction. A lesson plan containing a time schedule of activities, and the materials that would be used along with teaching strategies, was submitted by the instructor to DGA along with the Student Information Sheet.

A Material Order form was developed and used to ensure that additional materials needed by the instructors and not included in the modules would be available.

A Critique Sheet was completed by the instructor immediately after instruction and submitted to DGA by the middle of the following week.

The lead instructor played a most valuable role in maintaining program coordination and assisting the instructors in completing and submitting all the required forms to DGA. The Critique Sheets were reviewed by members of the Curriculum Team and DGA and served as the basis for refinement of the modules.

c. Project Staff Functions

The roles and functions of project staff in the module testing process were the following:

... overall administration of the effort;

... serving as the source for providing materials to be used in the instruction;

... duplicating needed materials;

... observing each class session;

... working with the lead instructor;

... maintaining coordination of all activities;

... ensuring continued communication, structured and informal, with and among the instructors.

3. Instructional Materials

In the instruction of Course 1 Modules, aside from a few Small Business Administration (SBA) booklets, and materials and publications found in the Bank of America Small Business Reporter Series, it was

discovered that there was very little published material which was relevant or could be utilized for course instruction.

Those publications that were identified and used were included in the course curriculum only as suggested reference materials for instructors. Any deviation from this rule was clearly delineated in the modules.

While searching for materials which dealt with small business ownership and management education for minorities, DGA found that all traditional vocational education "student information sheets" were not applicable, relevant or useful. Most of the materials did not address themselves to the subject matter we were to cover nor took into consideration the special needs and racial differences of our course participants.

DGA, recognizing that small business ownership and management is not a "by the numbers" process, developed a set of student sheets which were tailored to meet the nature of the course and which were consistent with the individual needs and differences of the course participants.

4. Evaluation

The pilot testing results of the introductory course produced, through utilization of the previously described testing plan, the revisions and refinements that culminated in the final product (see Appendix C).

The feedback we obtained by having students complete a post instruction evaluation form was in conformity with the perceptions of the instructors and was formally expressed in the instructor Critique Sheets and in informal discussions with project staff.

Module revisions, based on instructor critiques and staff notes made during monitoring and class observations, were maintained on an on-going basis throughout the course. The overall revision and refinement of the course materials was not performed until all the student evaluations were received and assessed. Of particular importance to DGA in evaluating the overall achievement of the stated course objectives were the student responses. Our objectives of making students aware of the personal and financial requirements and demands inherent in small business ownership and management, and providing the student with the opportunity to involve and assess himself/herself in the role of a small business owner/manager, were met.

Two (2) students did indicate that the course had not increased their awareness of the personal and financial requirements of being a small busines owner/manager. One of these two students did mention that the reason why the course had not increased his/her awareness was because he/she was already in business, and therefore knowledgable of the intricacies of small business ownership. The other student's criticism of the course was that the course failed to include in the curriculum substantial information regarding travel service, which was the students particular business interest.

The evaluation item, "the course (DID) (DID NOT) sufficiently cover what I, as a minority person, need to know to assess my potential and my willingness to undertake a small business venture, " received only four "DID NOT" responses. Overall student evaluation was positive and complimentary.

N. COURSE II TESTING

1. Test Site Arrangement

Arrangements were made to test Course II curriculum modules at two (2) sites. The first site was SFCC for those students who had successfully completed the

introductory course and the second was in the Skills Center of the San Francisco Community College District.

The first contact between DGA and the San Francisco Community College District was in September, 1975, when Mr. Green, DGA, met with Dr. Calvin Dellefield, President of the District, and discussed the possibility of a second test site being arranged within the District. Mr. Harriman continued to meet with Dr. Dellefield and Ms. Nancy Swadesh of the Community College District Office and eventually the Community College Skills Center was selected as a test site. The criteria used in selecting this site was based on its accessibility to the minority communities. A meeting was scheduled with Mr. Dan Peck, an administrator at the Skills Center, with whom final arrangements were made. The selection of Mr. Peck and the Skills Center was welcomed by their officials because they had not been pleased with earlier efforts to provide small business management courses.

Dr. Dellefield, Ms. Swadesh and Mr. Peck all expressed their high regard for the prepared modules and were pleased with the competency-based format, for utilization in the "adult education" setting.

Skills Center recruitment efforts were conducted by the Center, using the same approach that we had previously used - press releases, public service announcements, etc. Our original press release was used a model to develop the press release by the Skill Center.

Class instruction was scheduled for Tuesday nights, between 6:30 - 9:30 P.M.

SFCC arrangements for Course II testing were completed before Course I testing had been completed. A new classroom was assigned but the day and time (Saturday, 9:30 a.m. - 12:30 p.m.) remained the same.

These final arrangements cleared the way for the testing of Course II.

2. Instructors

Mr. Jose Maestre and Mr. Louis Barnett performed most of the instruction at both sites. Two new instructors were hired and utilized in Course II instruction. These instructors had not been previously involved in Course I testing; therefore, DGA provided complete orientation and training, prior to their utilization.

Mr. Douglas Sykes, a minority attorney active in small business legal matters, and Mr. Martin White, a minority businessperson and business advisor, each

instructed one session.

3. Materials

The nature of materials utilization in testing Course II was the same as for Course I.

In addition to testing the developed Course II modules, a course project was developed which required each student to develop a business plan for their chosen business venture. This assignment was designed to 1) provide the students with a tangible, usable product upon course completion, and 2) enhance the benefit of the modular instruction.

O. EXPLORATION FOR TRANSPORTABILITY OF CURRICULUM MODULES

The following activities and events occurred during the period Course I was being tested:

1. Discussion Concerning Usage of Developed Modules In Correctional Institutions

In September, 1975, DGA representatives opened up discussion on the subject of the transportability and usability of developed curriculum modules with the National and Region IX Offices of the Law Enforcement Administration Agency (LEAA), U.S. Department of Justice and the California Council on Criminal Justice (CCCJ). These discussions, which went on through October, 1975, were primarily concerned with the utilization of the developed

modules in correctional institutions. Although the discussions did not come up with a substantive solution, DGA retained a posture of willingness to explore all necessary avenues for the curriculum modules to be utilized in the general field of corrections.

P. IMPLEMENTATION AND PROCEDURES

1. Implementation

a. Implementation at SFCC

Course II was successfully implemented, as a follow-up to the introductory course at San Francisco City College (SFCC), on Saturday, February 7, 1976. Since we were testing Course I and Course II at SFCC on a consecutive basis, the chief pre-requisite to Course II was that only students who had successfully completed the introductory course were permitted to enroll in the SFCC evening class. It was unfortunate that the division bulletin of courses did not specify any pre-requisite of the course. This created somewhat of a problem at the first session since many "new" students showed up expecting to enroll. The Dean of the Evening Division, who was present at the first session, effectively

explained the nature of the course offering, thereby preventing any major problems.

More than 50 students attempted to sign up for the class. The actual class size, however, was twenty (20) persons, of whom sixteen (16) were minority group members.

b. Implementation at the San Francisco Community College Skills Center

On Tuesday, February 3, 1976 another Course II class was successfully implemented at the "Skills Center." In this socio-economic setting, the course was tested as a small business ownership/ management course for minority and female persons in the early stages of, or about to enter into, owning or managing their own business.

Because of unforeseen problems, actual instruction, and the administering of the pre-test had to be postponed until the second week of the course. More than 60 students attended the first class, of which fifty (50) were minority group members. The entire first session was spent in overviewing the total course content and purpose, and obtaining information from the students regarding their existing or proposed business ventures. The overview was provided so that the students could determine how closely they fit into the defined target group.

The information obtained from the students was necessary in order to determine who would be selected by the administrative office to participate in the course. Prior to the first session, a class size of thirty persons had been decided upon between Mr. Peck of the "Skills Center" and DGA Project Director. Mr. Peck and Mr. Harriman reviewed the information provided by the students as to their existing or proposed ventures and selected the participants. The persons that were not selected were individually informed that they had been placed on a waiting list. The persons that were selected were advised to come the following Tuesday night (February 10, 1976) for the beginning of instruction.

2. Procedures

The instructional procedures followed were the same at both sites. These procedures did not differ from those utilized during the testing of Course I.

Since there were only two primary instructors, the role and function of the lead instructor was not needed in Course II testing. During Course II testing, Mr. Bob Quigley, represented SFCC as the "Instructor of Record."

The process of testing Course II was hampered, somewhat, by a city-wide strike which closed down all public transportation facilities for approximately one month. The strike, which occurred during the middle of the semester, affected the attendance of students for four consecutive modules. Nevertheless, most of the students, who missed some or all of these sessions, were able to catch up after the city-wide strike was over. As a result of the strike, approximately five students from both test sites combined, had to "drop" the courses .

SECTION IV

CONCLUSIONS AND RECOMMENDATIONS

Based upon our experiences in the testing of the developed curriculum materials for Courses I and II, at the selected test sites, DGA project staff and Curriculum Team members submit the following conclusions and recommendations to the Office of Education, U.S. Department of Health, Education and Welfare:

CONCLUSION 1:

Final curriculum materials developed for both course offerings at San Francisco Community College Skills Center were tested with significant student enrollment, i.e., the majority of students in each class were members of minority groups and females.

The acceptance of the course offerings by the students and the institutions was overwhelmingly favorable. The content of the courses filled a stated void of need for present and future minority entrepreneurs in that the curriculum materials realistically addressed the "what is" and "how to" in small business ownership and management from a minority perspective. Testimony to the success of these course offerings in their respective socio-economic settings is the continuance of these

courses at both institutions, without specific federal assistance and the continued utilization of DGA instructors with provided provisional teaching credentials.

The final curriculum modules for both courses are effective and relevant for the education and training of minorities and females in the area of small business ownership and management.

RECOMMENDATION 1: That the Office of Education, U.S. Department of Health, Education and Welfare review and analyze the developed curriculum and materials of other Part I contractors - the National Business Education Association (NBEA), Athena Corporation and the University of Minnesota - to determine the feasibility of incorporating DGA's developed curriculum materials into their final products.

RECOMMENDATION 2: That the Office of Education, U.S. Department of Health, Education and Welfare share the curriculum materials developed under this contract with the Office of Minority Business Enterprise (OMBE) and the Small Business Administration (SBA), U.S. Department of Commerce and the Task Force On Education and Training For Minority

Business Enterprise, chaired by the U.S. Department of Commerce and chartered by the U.S. Department of Health, Education and Welfare in January, 1974 and encourage usage through their agency networks to promote education and training in small business ownership and management for minorities and to avoid a duplication of effort.

CONCLUSION 2:

During the first year of the contract, DGA conducted an extensive national search for relevant curricula and materials which were designed for use in business administration courses, and addressed the needs of small business ownership and management of minorities. Responses from institutions contacted, i.e. universities, skill centers, publishing houses, etc., indicated that no such information was available. Many of those agencies contacted indicated their interest in having DGA furnish them with copies of the curriculum and materials in this subject area.

RECOMMENDATION 1: That the Office of Education, U.S. Department of Health, Education and Welfare widely disseminate through its periodicals, bulletins, etc. the availability of curriculum and materials developed under this contract.

RECOMMENDATION 2: A special effort should be made by the Office of Education to distribute copies of our final report and appendices to Black/Chicano universities, colleges and junior colleges, and additionally,to make this report available to educational agencies in urban and rural areas where there is a high percentage of minorities.

CONCLUSION 3:

DGA contacted the Bureau of Indian Affairs (BIA), U.S. Department of Interior, the Agency for International Development (AID), U.S. Department of State and CETA, U.S. Department of Labor, to discuss the transportability and usability of developed curriculum and materials for small business ownership and management for minorities. Each of these agencies immediately expressed a need for such curriculum and materials and claimed recognition for transportability and usable opportunities in their independent programs. DGA proceeded to encourage, through pilot demonstration programs, the use and application of developed curriculum and materials, independently through the respective agencies. No conclusions were reached through federal regional offices of the respective federal agencies.

RECOMMENDATION: That the U.S. Office of Education, U.S. Department of Health, Education and Welfare conduct national and regional workshops or seminars through Federal Executive Boards to develop an understanding of the state of the art in curriculum development for small business ownership and management for minorities. Through such an effort federal inter-agency cooperation will be developed to promote the enhancement and success of achieving the goals and objectives of the aforementioned Task Force.

CONCLUSION 4:

Small business ownership and management as it relates to a minority business person must expand beyond the confines of a local minority community and its members to be successful. A minority community does not necessarily support minority owned businesses within any given community and for whatever reason(s). The successful survival and support within any given minority community of minority business will only occur through attitudinal changes of local residents. In other words, for minority business success in any community money must change hands within that community a minimum of three times. If not, the cash in and out of any

given minority community will not support and make successful minority business persons.

RECOMMENDATION: That federal and state governments work collectively together, with the Office of Education, using specified roles, to identfy and resolve the problems of minority business persons and aggressively seek to successfully implement minority businesses in given communities with greater success ratios, through education and training.

CONCLUSION 5:

Major businesses in the private sector continue to shower token contract awards to minority business persons, regardless of capability and qualifications. This, in effect, serves no real purpose other than to assist the contracting agency or vendor to attain visibility for complying with local affirmative action programs.

RECOMMENDATION 1: That U.S. Office of Education, Department of Health, Education and Welfare thoroughly assess existing programs and businesses in selected minority communities to determine their economic visibility. This effort should be a joint effort between the U.S. Department of Commerce and

the U.S. Department of Health, Education and Welfare within given federal agencies.

RECOMMENDATION 2: That the U.S. Office of Education, Department of Health, Education and Welfare define support parameters of each federal agency and collectively provide, through education and training at the local levels, (non-degree oriented), the essential post secondary education to enable minority business persons, present and futuristic, to obtain an indelible position in our nation's economic patterns.

COURSE I

POST-INSTRUCTION COURSE EVALUATION FORM

INSTRUCTIONS

Your responses to the items of the "Post Instruction Course Evaluation Form" constitute an important part of the overall assessment of the course. Please, therefore, complete your responses as completely, and as thoroughly as possible.

You have been furnished a code number which should be placed on the line indicated in the upper right hand corner of the question sheet.

Though Items 1 and 3, which follow, do not specifically request response explanations, space is provided for comments if desired. Please note that Items 2 and 4 specifically request evaluative information. If additional space is needed, please use the back of the sheet.

Lastly, encircle your choice in each of the first three (3) items that follow.

Student Code Number

COURSE I

POST-INSTRUCTION COURSE EVALUATION FORM

1) The course (did) (did not) serve the purpose of increasing my awareness of the personal and financial requirements of being a small business owner/manager.

2) I have decided (to) (not to) pursue the follow-up course. Briefly explain the reason for your choice and indicate how this course influenced your decision.

3) The course (did) (did not) sufficiently cover what I, as a minority person, need to know to assess my potential and my willingness to undertake a small business venture.

4) Write a brief evaluation of the course, indicating suggestions you may have for its improvement.

"EXHIBIT 1B"

COURSE EVALUATION FORM -- PRE-TEST

COURSE II

INSTRUCTIONS

Your responses to the items of the "Pre-Instruction Course Evaluation Form" constitute an important part of the overall assessment of the course. Please, therefore, complete your responses as completely and as thoroughly as possible.

You have been furnished a code number which should be placed on the line indicated in the upper right hand corner of the question sheet.

Please respond to questions 1-6 as clearly and concisely as possible.

_____
Student Code Number

COURSE EVALUATION FORM -- PRE-TEST

1. Discuss the purposes served by a Business Plan.

2. Identify the basic elements of a Business Plan.

3. For your selected business, to whom would you present a Funding Plan?

4. Who would be the primary user of your Operating Plan?

5. Briefly describe the market of your firm's product(s) or service(s).

6. Encircle one of the following which best describes the nature of your business:
   Retail, Wholesale, Manufacturing, Service

   Describe your product or service.

COURSE EVALUATION FORM -- POST-TEST

COURSE II

INSTRUCTIONS

Your responses to the items of the Post-Instruction Course Evaluation Form" constitute an important part of the overall assessment of the course. Please, therefore, complete your responses as completely and as thoroughly as possible.

You have been furnished a code number which should be placed on the line indicated in the upper right hand corner of the question sheet.

Please respond to questions 1-6 clearly and concisely as possible.

Student Code Number

COURSE II

COURSE EVALUATION -- POST-TEST

1) Discuss the purposes served by a Business Plan.

2) Identify the basic elements of a Business Plan.

3) For your selected business, to whom would you present a Funding Plan?

4) Who would be the primary user of your Operating Plan?

5) Briefly describe the market of your firm's product(s) or service(s).

6) Write one paragraph describing how this course may have been of greater assistance to you. Include what you consider the weak and strong points of the course.

Dave Harriman
Del Green Associates
1181 Chess Drive, Suite 200
Foster City, California 94404

(415) 574-4737

"EXHIBIT 2A"

PRESS RELEASE PRESS RELEASE PRESS RELEASE PRESS RELEASE

NEW COURSE OFFERING
FOR MINORITIES
IN
SMALL BUSINESS OWNERSHIP AND MANAGEMENT

FOR IMMEDIATE RELEASE

A new course is being offered this Fall at San Francisco City College, titled Introduction to Small Business Ownership and Management (Business 695). The curriculum for this course, which is geared to meet the needs of minorities who aspire to become owners or managers of their own business enterprise, was prepared by Del Green Associates under contract to the U. S. Office of Education/ Department of Health, Education and Welfare.

The course covers the personal and financial requirements and demands of small business ownership and management and emphasizes development of self-concept and assessment of self in the role of a small business owner/manager.

The course is being offered on a "credit/no credit" basis with class sessions scheduled for Saturday mornings, 9:30AM to 12:30PM. Curriculum for a follow-up course has also been developed and will be offered during the Spring semester as Business 696, Practical Exercises in Small Business Ownership and Management, for those students successfully completing the introductory course.

While minority needs and interests constitute the main thrust of the course, participation by non-minorities is not excluded.

Minority persons, and others, interested in taking this course must enroll either Saturday, August 30, between 10AM and 1PM or the following Saturday, September 6, between 10AM and 12 NOON at the Lower Level Student Union on the City College campus. Further information may be obtained by calling the Evening Division of San Francisco City College at 587-7272.

- end -

"EXHIBIT 2B"

DEL GREEN ASSOCIATES
1181 CHESS DRIVE, SUITE 200
FOSTER CITY, CA. 94404
CONTACT: DAVID L. HARRIMAN
(415) 574-4737

AUGUST 26, 1975

SMALL BUSINESS OWNERSHIP/MANAGEMENT COURSE FOR MINORITIES

THIRTY (30) SECOND PUBLIC SERVICE ANNOUNCEMENT

TO LEARN HOW TO OWN OR MANAGE A SMALL BUSINESS, ENROLL SATURDAY MORNING, SEPTEMBER 6, AT CITY COLLEGE OF SAN FRANCISCO. SATURDAY MORNING CLASSES WILL COVER PERSONAL AND FINANCIAL REQUIREMENTS WITH ATTENTION TO THE NEEDS OF MINORITIES WISHING TO OWN OR MANAGE A BUSINESS. THE CURRICULUM FOR "BUSINESS COURSE 695" WAS CREATED FOR THE U. S. OFFICE OF EDUCATION BY DEL GREEN ASSOCIATES. CALL CITY COLLEGE, EVENING DIVISION, 587-7272.

"EXHIBIT 2C"

NEW COURSE OFFERING
IN
SMALL BUSINESS OWNERSHIP AND MANAGEMENT

PUBLIC SERVICE ANNOUNCEMENT SENT TO THE FOLLOWING MEDIA - AUGUST 26, 1975:

TELEVISION STATIONS

KGO (7)	American Broadcasting Co. 277 Golden Gate Avenue S. F. CA 94104 Attn: BEVERLY HAYON	863-0077
KBHK (44)	420 Taylor St. S. F. CA. 94104 Attn: FRANK PHILPOT	885-3750
KEMO (20)	2500 Marin St. S. F. CA. 94124	285-6420
KQED (9)	1011 Bryant St. S. F. CA. 94104 Attn: AVON KIRKLAND	864-2000
KTVU (2)	1 Jack London Square Oakland, CA	834-2000
KPIX (5)	Van Ness Avenue & Greenwich S. F. CA. 94133	776-5100
KRON (4)	1001 Van Ness Avenue S. F. CA. 94133 Attn: TERRY LAWRY	441-4444

"EXHIBIT 2D"

NEW COURSE OFFERING
IN
SMALL BUSINESS OWNERSHIP AND MANAGEMENT

PUBLIC SERVICE ANNOUNCEMENT SENT TO THE FOLLOWING MEDIA AUGUST 26, 1975:

RADIO STATIONS

KSOL	600 S. Bayshore Blvd. San Mateo, CA 92701 Attn: HERMAN HENRY	347-6638
KYA	1 Nob Hill Circle S. F. CA 94133	397-2500
KDIA	Bay Bridge Toll Plaza Oakland, CA 94612 Attn: ANA THORN	397-3224
KCBS	1 Embarcadero Center S. F. CA 94144 Attn: JOANNA MCALLISTER	982-7000 982-7016
KFRC	415 Bush St. S. F. CA 94104	982-9842 982-9200
KOFY	Spanish Broadcasting Systems, Inc. 1818 Gilbreth Rd. Burlingame, CA 94010	692-2433
KNBR	National Broadcasting Co., Inc. Fox Plaza S. F. CA Attn: JANE MORRISON	626-6700
KABL	632 Commercial St. S. F. CA 94104	982-9586

"EXHIBIT 2E"

NEW COURSE OFFERING
IN
SMALL BUSINESS OWNERSHIP
AND MANAGEMENT

PRESS RELEASE SENT TO THE FOLLOWING NEWSPAPERS, AUGUST 21, 1975

Editor
East West Chinese American News Weekly
758 Commercial Street
S. F. CA. 94111
781-3194

Editor
San Francisco Progress
851 Howard St.
San F. CA. 94103
982-8022

Education Editor / Attn: Don White
San Francisco Chronicle
5th & Mission Streets
S. F. CA 94107
421-1111

Editor / Attn: Peter Manani
Sun Reporter
1366 Turk St.
S. F. CA 94118
931-5778

Education Editor
San Francisco Examiner
110 5th St.
S. F. CA. 94107
781-2424

Editor Attn: Ricardo Virgo
El Mundo
630 20th St.
Oakland, CA 94612
763-1120

Editor / Attn: Howard M. Imazeki
Hokubei Mainichi
1737 Sutter Street
S. F. CA 94115
567-7323

Editor
Philippine News
1175 Folsom St.
San F. CA 94103
864-5600

Editor / Attn: Mrs. Michi Onuma
Nichi Bei Times
2211 Bush St.
S. F. CA. 94115
921-6820

"EXHIBIT 2F"

HOKUBEI MAINICHI
NORTH AMERICAN DAILY

1737 Sutter Street, San Francisco, California 94115 | SATURDAY, AUG. 2? 1975

New Course Offered for Minorities in Small Business Ownership, Management

A new course is being offered this fall at San Francisco City College, titled "Introduction to Small Business Ownership and Management" (Business 695). The curriculum for this course which is geared to meet the needs of minorities who aspire to become owners or managers of their own business enterprise, was prepared by Del Green Associates under contract to the U.S. Office of Education - Department of Health, Education and Welfare.

The course covers the personal and financial requirements and demands of small business ownership and management and emphasizes development of self-concept and assessment of self in the role of small business owner-manager.

The course is being offered on a "credit - no credit" basis with class sessions scheduled for Saturday mornings, 9:30 a.m. to 12:30 p.m. Curriculum for a follow-up course has also been developed and will be offered during the spring semester as Business 696, "Practical Exercises in Small Business Ownership and Management," for those students successfully completing the introductory course.

While minority needs and interests constitute the main thrust of the course, participation by non-minorities is not excluded.

Minority persons, and others, interested in taking this course must enroll either Saturday, Aug. 30, between 10 a.m. and 1 p.m. or the following Saturday, Sept. 6, between 10 a.m. and 12 noon at the Lower Level Student Union on the City Colegel campus.

Further information may be obtained by caling the Evening Division by calling the Evening College at 587-7272.

"EXHIBIT 3A"

CRITIQUE SHEET

MODULE: _____ DATE: _____

PRIMARY INSTRUCTOR: _____

BACK-UP INSTRUCTOR: _____

I. ADHERENCE TO LESSON PLAN/AGENDA AS SUBMITTED.

II. ACCOMPLISHMENT OF OBJECTIVES -- EVALUATION.

III. SUGGESTED REVISIONS - Include any component ("Rationale" thru "Materials Needed")

IV. OTHER REMARKS.

PS-002
(DGA-10/75)

EXHIBIT 3B"

MATERIAL ORDER

Module _____

Date _____

Instructor _____

NO. COPIES NEEDED	CODE NOS. SYMBOL	DESCRIPTION OR TITLE

NOTE TO INSTRUCTOR:

The suggested list of materials indicated in the Module is for your guidance. Any other materials you wish to use should be ordered 8 days in advance of your module, especially if you want the materials distributed to the students beforehand.

PS-003
(DGA-10/75)

"EXHIBIT 3C"

STUDENT INFORMATION SHEET

MODULE NO. _____ INSTRUCTOR: _____

DATE OF CLASS _____

PURPOSE

_____

_____

_____

_____

_____

PROPOSED ACTIVITIES

_____

_____

_____

_____

SUGGESTED READINGS OR OTHER PREPARATION

_____

_____

_____

_____

SPECIFIC ASSIGNMENT, IF ANY

_____

_____

_____

_____

PS-001
(DGA-10/75)

"EXHIBIT 4"

Community College Centers of the San Francisco Community College District

Dr. Calvin Dellefield
President

July 26, 1976

To Whom It May Concern:

We, at the San Francisco Community College Skills Center intend to offer both Small Business courses this coming year (1976-77). We have found the curriculum to be both well planned and practical. The success and continued interest of the San Francisco Community warrants repeating both courses.

We have taken the necessary steps to credential both instructors, Jose Maestre and Louis Barnett and hope to involve them again in our upcoming program. David Harriman, who initiated the program was invaluable throughout the program and was most generous with his ideas and time.

Sincerely,

Dan Peck

Dan Peck
Supervisor of Instruction

DP:gy

33 Gough Street, San Francisco, CA 94103
(415) 864-3200

District Governing Board — Robert E. Burton, President
John Riordan, Vice President Ernest Ayala John Yehall Chin
Reynold H. Colvin Peter M. Finnegan Doris M. Ward

Mission Community College Center
938 Valencia Street (415) 648-1418
San Francisco, CA 94110

Alemany Community College Center
750 Eddy Street (415) 885-5212
San Francisco, CA 94109

Community College Skills Center
1311 Sutter Street (415) 441-1176
San Francisco, CA 94109

Galileo Community College Center
1749 Bay Street (415) 922-6620
San Francisco, CA 94109

John Adams Community College Center
1860 Hayes Street (415) 346-7044
San Francisco, CA 94117

John O'Connell Community College
Technical Center (415) 282-3100
21st & Harrison, San Francisco, CA 94110

Pacific Heights Community College Center
31 Gough Street (415) 626-0996
San Francisco, CA 94103